

UNIT MANAGEMENT REPORTS

GSOC 0304



OVERVIEW

Balance Analysis Report
Using Unit Performance
Report

MCGERR Items

LM2 Report

BALANCE ANALYSIS REPORT



BALANCE ANALYSIS REPORT (BAL ANAL)

- Snap Shot of stock status for Commanding Officer and Supply Officer.
- Broken down by Line items and dollar value.
- Supply Officer reviews da



BALANCE ANALYSIS REPORT

3 Page Report

SAC 1

SAC 2

SAC 3

BALANCE ANALYSIS

Look at 3 basic areas'
!!!

1. On-Hand AA

2.Excess Dues

3.Excess Backorders
Retain for 1

year

Ref: UM 4400-124 Pg 3-

USING UNIT PERFORMANCE REPORT

- **Examines the account's performance**
- **Identifies possible trends**
- **Provides info on transactions**
- **Value of gains and losses**
- **Outstanding backorders**



QUIZ TIME



Q. WHAT IS THE BALANCE ANALYSIS USED FOR?

Q. WHAT REFERENCE CAN YOU FIND INFO ABOUT THE USING UNIT PERFORMANCE REPORT ?

Q. WHAT 3 AREAS OF THE BALANCE ANALYSIS SHOULD WE LOOK AT ?

MARINE CORPS GROUND EQUIPMENT RESOURCE REPORTING SYSTEM (MCGERRS)

- **Subsystem of
ATLASS/MIMMS**
- **Reflects the current status
of ground equipment.**
- **Reportable equipment
identified annually per
McBul 3000**



MARINE CORPS GROUND EQUIPMENT RESOURCE REPORTING SYSTEM (MCGERRS)

- **Provides identification of excess/deficiencies.**
- **Shows an overview of Maintenance and Supply systems.**



REPORTABLE PEI'S

- PEI's Nominated by MARFOR's
- Combat Essential
- Items readily replaced are non-reportable
- Non-repairable items are excluded

MISSION ESSENTIAL EQUIPMENT (PACING)

- Essential and indispensable to the mission of
- the unit.
Continuous monitoring and management
- Identified by TAMCN in Encl. 1 MCBul 3000
- Commanders make final recommendation

RECONCILIATION

- Reconcile LM2 with T/E and MCBUL 3000
- Ensure all MCGERRRS listed on LM2
- Correct authorized quantities
- Reconcile on **MONTHLY** basis

RECONCILIATION STEPS

STEP 1

On a scratch piece of paper, enter the following columns of information:

TAMCN
Remarks

Qty Authorized

Qty Possessed

RECONCILIATION STEPS

STEP 2

Match TAMCN's in T/E against enclosure (1) of the McBul 3000.

If listed on the T/E and McBul 3000, enter TAMCN and allowance qty on scratch paper.

NOTE: Do not list planned allowances.

RECONCILIATION STEPS

STEP 3

Screen the MAR to determine the current on hand quantities for reportable items that you have listed on your scratch paper.

When screening the MAR you will report the total for TAMCN on hand number as the total quantity possessed for each TAMCN.



QUIZ TIME



Q. WHAT DOES THE ACRONYM MCGERRS STAND FOR ?

Q. HOW OFTEN SHOULD ALLOWANCE FILES BE RECONCILED ?

Q. WHAT ARE REPORTABLE PEI'S ?

MIMMS/LM2 REPORT

PURPOSE:

**TO LIST READINESS REPORTABLE
TAMCN'S POSSESSED BY COMMAND**

Report fields:

- a. QUANTITIES**
- b. DEADLINED EQUIPMENT**
- c. REMARKS**
- d. READINESS RATINGS**

LM2 TRANSACTIONS

There are two types of transactions that the Maintenance Management Officer (MMO) will input to adjust the LM2.

LM2 ASSET TRANSACTION - Add, change, or delete reportable end items.

LM2 DEADLINED TRANSACTION - Items in deadlined status.

RM4 REMARKS TRANSACTION

- Used to record information pertinent to a specific TAMCN
- To update information present
- Supply will provide TAMCN and applicable remarks to MMO

Reporting T/O&E T/A) Deficiencies

- Commanders will ensure strict adherence to timely reporting.

Report Columns in RM 4 Remarks:

T/O&E (T/A) DEFICIENT QUANTITY

DOCUMENT NUMBER

STATUS

STATUS DATE (JULIAN)

PLANNED TO ACTUAL

- Submit a challenge to change from planned to actual.
- Increase Units LM2 report to reflect quantity.

Equipment documented in RM4 as follows:

Example:

P/ALW: 12

QTY : 10

FOR FY: 2004

QTY RECV: 2

TO&E CH REQ DTD: 3260

EXCESS REPORTING MODERNIZATION

- Unit will report excess pending resolution of T/E challenge.
- RM4 remark submitted explaining excesses.

RM4 Remarks:

DISP REQUESTED QTY
DATE (JULIAN)

EXCESS REPORTING

T/E Change Request

- Unit will report equip. pending resolution of T/E change request.
- RM4 remark submitted explaining excesses.
- Report per MCO P4400.82_
- Screen MSC deficiencies
- Submit via WIR

CORROSION PREVENTION AND CONTROL (CPAC)

- Unit under CPAC program will report equip. as not-mission capable RM4
- Documented in RM4 remarks:

CPAC QTY
DATE

COMMAND ADJUSTMENT AND MAGTF REPORTING

- Command directing realignment
- MAGTF is coordinated effort between Log and Ops.
- Temp Loans may occur
- Asset changes will be closely coordinated



QUIZ TIME



Q. WHAT ARE THE 2 LM2
TRANSACTIONS?

Q. WHAT ARE 2 CASES THAT WE REPORT
BECAUSE OF EXCESSES?

Q. WHAT DOES THE ACRONYM PEI STAND
FOR?

SUMMARY

BALANCE ANALYSIS REPORT

USING UNIT PERFORMANCE REPORT

MCGERRS

LM2 REPORT





FINAL QUIZ



Q. WHAT DO YOU TAKE THAT LAST 10 MINUTES?

BREAK !!!!!!!!!!!!!!!